

Planning to Communicate: A Budget Companion

School business officials must have a plan to ensure the appropriate message is conveyed to all stakeholders.



By Marvin Dereef, SFO

When I was growing up, I was told failure to plan is a plan to fail. I take that to heart in all my endeavors, including managing the budgeting process for the fourth largest school district in Georgia. Failing to have a plan to communicate with stakeholders during the budget process is a plan to fail. Without community support, getting budget approval can be difficult.

Granted, there is a lot of communicating during the budget process: discussions at board meetings and public hearings, as well as media coverage in print, on television, and on the Internet. But information flows in so many ways and from so many people that it's some-

times hard to distinguish facts from rumors. Therefore, school business officials must have a plan to ensure the appropriate budget message is conveyed throughout all communication channels. In fact, a communication plan is the best companion your budget process can have. That plan should guide you in what to say, to whom, when, and how.

Your Communications Plan

Developing a communication plan is a multi-step process. First, you must identify the school district's communication strengths, weaknesses, opportunities, and threats. This information will guide the develop-

ment of your plan and the dissemination of your budget information.

The second step is to establish what you want to accomplish. What is your reason for communicating the information? List your measurable objectives.

A communications plan is the best companion your budget process can have.

Now it's time to identify your audience. Who should receive the message? Who is your audience?

School Board. Whether you are communicating directly to the board or advising the superintendent about what information to communicate, it's important to establish talking points that convey the message clearly. It's also vital that the data shared with the board—which the board will, in turn, share with others—be relevant and reliable. Outdated information does not help decision makers and may actually misrepresent the financial condition of the school district at the time. Even if the board will be presenting previously validated data, make sure the budget department revalidates the information.

Taxpayers. During last year's tax millage rate public hearing, two taxpayers objected to raising the tax rate. The first was an elderly lady who said she shouldn't have to pay school tax because her kids are grown and no longer live with her. She also said that raising taxes during a recession was crazy. The second taxpayer to object was a man who not only objected to the increase but questioned the math skills of the budget department. He stated that the percent of the increase was higher than stated in the legally required newspaper advertisement of a "state-defined" tax increase.

When you develop your communications plan, recognize that the public may push back. Be prepared. Launch a Webpage that educates stakeholders on how the budget numbers are derived. This helps confirm the quality of the data and clear up misconceptions.

Legislators. Education is the largest expenditure in most state budgets, and at a time when states are suffering major budget shortfalls, education becomes a logical target.

As a school district, how do we voice our concerns or make suggestions on how to minimize state reductions of education resources? Most school boards voice their position on legislative issues through a board-approved resolution, which the board chair or a representative presents to the General Assembly. Sometimes the superintendent or other school officials are summoned by legislators to discuss budget challenge or other issues that affect education. Some districts even hire a lobby-

ist or are a part of an association that has a lobbyist on behalf of the group.

Whatever the case, the individuals who are communicating to legislators must keep in mind they are not communicating on their own behalf, but on behalf of the school district. Therefore, they must have a clear understanding of school district, goals, data, and message.

Parents. What's the difference between taxpayers and parents? Taxpayers are concerned about where resources are coming from; parents are concerned about where resources are going.

As a parent, I want to make sure the school is funding the areas of education that benefit my child. For example, one highly publicized expenditure reduction measure for Fulton County Schools would eliminate a particular program's funding from the general fund budget. Parents were very vocal about this reduction during the budget process, but as with many cases, those who were opposed were more vocal than those who supported the reduction. This gave a false impression of what the majority of parents wanted.

When making a budget decision, you must consider every stakeholder and give each a means to be heard. One of the communication tools we use is an email address to which parents can submit their views about budget items. We compile the emails and tally opinions by budget item to get a clear perspective of the masses. The loudest voice may not be the voice of consensus. The email address for budget input helps us recognize that fact.

Launch a Webpage that educates stakeholders on how the budget numbers are derived.

Media. The media has the power of influence. People believe that if it is written in the newspaper it has to be true. Well, I have had experiences to the contrary. The media might not intentionally mislead the public, but sometimes journalists' interpretation or embellishment does skew the information. What can you do about it?

The better the relationship with the audience, the better the communication, and vice versa. The department responsible for communicating to the media must understand the importance of budget messaging and of the relevance, timeliness, and accuracy of budget information. The department must have the ear of the media and not the other way around.

Make sure the communications department always validates with the budget department before providing the media with any numbers.



Schools uses the district Website, televised board meetings, email requests for budget input, newsletters, and a monthly video blog as its vehicles during the budget process. Our communication department helps ensure the media report our budget information correctly and fairly.

During the budget process, the communication vehicle is the “how” of an equation.

Timing the messages is important. This is where you use your budget calendar to infuse your communication plan. For example, if you are at the beginning of your budget process and you have a monthly newsletter, this month the newsletter will focus on engaging and educating stakeholders about the budget process. The monthly employee meeting agenda will include time for the budget director to address the start of the budget cycle. Include your communication vehicles on your budget calendar or timeline.

In the End

At the end of the budget process, take time to evaluate your efforts. How well did you execute the communication plan? Use a survey, comment cards, or feedback from employees to evaluate your results.

There is no one-size-fits-all to communicating during the budget process, but the more you prepare and plan, the more successful you will be at achieving your goals and objectives.

Marvin Dereef, SFO, is executive director of budget services for Fulton County Schools in Georgia. Email: Dereef@fultonschools.org

Employees. Employees' input is essential to allocating limited resources throughout the district. They know where to look for waste and they know which areas are on life support and need additional funding. Include the employees in the budget development process by soliciting their input throughout the development and implementation process.

The department must have the ear of the media and not the other way around.

Students. We must never forget why we do what we do. We are here to educate students. Include students in the budget process because it affects their learning experience. They may be able to provide viewpoints that can maximize resources and improve instruction. What business succeeds without listening to the main customers?

What and How?

Now that you know who your stakeholders are, what do they need to know that will help you meet the district's goals and objectives? If your objective is to develop a timely, relevant, and concise budget presentation that benefits stakeholders, what message do you provide to your audience? Decide exactly what you want to convey based on your goals and your audience.

Then it's time to identify the communication vehicles. During the budget process, the communication vehicle is the “how” of an equation. How can a single mother of two, working long hours, know that her child's program might be cut? Where can a taxpayer with no children go to protest a tax increase? Different stakeholders require different means of getting the message, and all must have transparency, relevance, and timeliness.

Some common vehicles used during the budget process are board meetings, community meetings, employee meetings, Websites, and district newsletters. Fulton County